Special Treatment of Local Fields in IZ records not linked to NZ

Summary

Local fields in IZ records that are not linked to the NZ need to have “$$A 01CALS\_USM” added in order for Primo to display/index them.

Alma Procedure

1. Create a logical set (Do not delete this set, it will be used in the monthly process.)
	1. In **Repository Search**, do an Advanced search and create a logical set of All titles in the Institution Zone where: **Is linked** = No AND **Tag suppressed** = No
	2. Save your search query
2. Filter the set for records that don’t have $A in the local fields
	1. In **Manage Sets**, for set just created, under … (ellipses), select **Filter Set**
		1. In **Set Details**, enter Set Name, and if desired Description and Note
		2. In **Filter Set** area, in the drop-down list select Indication Rule: **Find local fields w/o subfield $A** ([See below for indication rule details](#IndicationRuleDetails).)
		3. **Submit** Job
	2. You will receive an e-mail when job is completed
3. Run a job to batch update the records in the set to append $A01CALS\_USM to the local fields
	1. In **Run a Job** (See below for [norm rule details](#NormalizationRuleDetails) and how to apply it to a [process](#SetUpProcess)):
		1. Select/search for job: **Append $A01CALS\_USM to local fields**
		2. Select the filtered set just created
		3. Accept task parameters and click Next
		4. Confirm job details and click **Submit** (or Back if you need to make corrections)
	2. You will receive an e-mail when job is completed

Ongoing/monthly process

* Subfield “$$A 01CALS\_USM” needs to be added to local fields in all records in the IZ that will not be shared with/linked to the NZ.
* This applies to any vendor records or non-OCLC records that are not going to be linked to the NZ.
* Each month use the logical set created in step 1 above, follow steps 2 and 3 to find records without subfield $A in the local fields and batch update those records to append subfield $A to the local fields.

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Rules details and Setup of normalization process

**Indication rule details**

Rule Name: Find local fields that do not have subfield $A

rule "find local fields that do not have subfield $A"

when

(exists "590.9") AND (not exists "590.A.\*") OR

(exists "591.9") AND (not exists "591.A.\*") OR

(exists "592.9") AND (not exists "592.A.\*") OR

(exists "597.9") AND (not exists "597.A.\*") OR

(exists "598.9") AND (not exists "598.A.\*") OR

(exists "690.9") AND (not exists "690.A.\*") OR

(exists "691.9") AND (not exists "691.A.\*") OR

(exists "694.9") AND (not exists "694.A.\*") OR

(exists "696.9") AND (not exists "696.A.\*") OR

(exists "971.9") AND (not exists "971.A.\*") OR

(exists "972.9") AND (not exists "972.A.\*") OR

(exists "973.9") AND (not exists "973.A.\*") OR

(exists "974.9") AND (not exists "974.A.\*")

then

set indication."true"

end

**Normalization rule details** (rule based on [Local bibliographic metadata at San Marcos](https://libri.csusm.edu/pages/viewpage.action?pageId=14025647))

Rule Name: Append subfield $A to local fields

rule "Append subfield $A 01CALS\_USM to local field if it doesn't exist"

 when

 (TRUE)

 then

 addSubField "590.A.01CALS\_USM" if (not exists "590.A.01CALS\_USM")

 addSubField "591.A.01CALS\_USM" if (not exists "591.A.01CALS\_USM")

 addSubField "592.A.01CALS\_USM" if (not exists "592.A.01CALS\_USM")

 addSubField "597.A.01CALS\_USM" if (not exists "597.A.01CALS\_USM")

 addSubField "598.A.01CALS\_USM" if (not exists "598.A.01CALS\_USM")

 addSubField "690.A.01CALS\_USM" if (not exists "690.A.01CALS\_USM")

 addSubField "691.A.01CALS\_USM" if (not exists "691.A.01CALS\_USM")

 addSubField "694.A.01CALS\_USM" if (not exists "694.A.01CALS\_USM")

 addSubField "971.A.01CALS\_USM" if (not exists "971.A.01CALS\_USM")

 addSubField "972.A.01CALS\_USM" if (not exists "972.A.01CALS\_USM")

 addSubField "973.A.01CALS\_USM" if (not exists "973.A.01CALS\_USM")

 addSubField "974.A.01CALS\_USM" if (not exists "974.A.01CALS\_USM")

end

**Set up normalization process** for the normalization rule just created which can then be called up under Run a Job

* Alma Configuration (gear icon in upper right corner)
* Cataloging – Metadata Configuration
* Profile – Marc21 Bibliographic
* Normalization Processes Tab – Add process
	1. Enter Name and Description 🡪 Next
	2. Add Tasks
		+ Select **MarcDroolNormalization**
		+ Add and Close
		+ Next
	3. At Drools File Key, from the drop-down list, select the norm rule: **Append $A 01CALS\_USM to local fields**
		+ Save